MAGNA SKILLS DEVELOPMENT INSTITUTE

Capacity Building • Professional Training • Organisational Development

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Course Profile Document

Banking and Financial Services

Pension Fund and Investment Management

Prepared as a professional course profile for delegate review, sponsorship approval and organisational training planning.

COURSE CODE	DELIVERY	DURATION	PREPARED FOR
MSD2588	**Online / Face-to-Face**	**Flexible**	**Organisation Approval**

Register for this Course

View Online Course Page

Course Overview

The **Pension Fund and Investment Management** course by **Magna Skills** is a comprehensive programme designed to equip pension fund trustees, board members, finance professionals, regulators, and investment officers with advanced knowledge and practical skills in pension fund governance, investment strategy, risk management, compliance, and portfolio performance evaluation.

With increasing regulatory scrutiny, demographic shifts, and volatile global financial markets, pension fund managers must adopt sound governance structures, prudent investment policies, and sustainable asset allocation strategies to safeguard beneficiaries' retirement savings. This course provides participants with practical tools, case studies, and African-focused pension reform insights to enhance fund sustainability, transparency, and long-term growth.

The programme blends theory with real-world applications to ensure pension funds remain financially sound, compliant, and aligned with best international practices.

Course Outcomes

By the end of this course, participants will be able to:

1. Understand the structure, governance, and regulatory framework of pension funds.
2. Develop effective investment strategies aligned with pension liabilities.
3. Assess and manage financial, operational, and market risks.
4. Evaluate fund performance using appropriate benchmarks and reporting tools.
5. Strengthen fiduciary responsibility and ethical decision-making in pension management.

Course Outline / Curriculum

. Introduction to Pension Systems and Fund Structures

- Types of pension schemes (Defined Benefit, Defined Contribution, Hybrid)
- Structure and operational models of pension funds

2. Pension Fund Governance and Fiduciary Responsibilities

- Roles of trustees, boards, and fund managers
- Ethical responsibilities and accountability mechanisms

3. Regulatory and Compliance Framework

- Pension laws and supervisory authorities in Africa
- Reporting requirements and regulatory compliance standards

4. Investment Principles for Pension Funds

- Risk-return trade-off and time horizon considerations
- Strategic vs. tactical asset allocation

5. Asset Allocation and Portfolio Construction

- Diversification across asset classes (equities, bonds, real estate, alternatives)
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- Liability-driven investment strategies

6. Risk Management in Pension Fund Investments

- Market, credit, liquidity, and operational risk management
- Stress testing and scenario analysis

7. Performance Measurement and Evaluation

- Benchmarking and key performance indicators (KPIs)
- Evaluating fund managers and investment performance reports

8. Alternative Investments and Sustainable Investing

- Infrastructure, private equity, and real assets
- ESG (Environmental, Social, Governance) integration in pension funds

9. Actuarial Valuation and Funding Strategies

- Funding ratios and solvency assessments
- Managing pension deficits and long-term sustainability

10. Emerging Trends and Challenges in Pension Fund Management

- Digital transformation and fintech in pension administration
- Demographic changes and pension reforms in Africa

Target Audience

Entry-level delegates that wish to develop a broad understanding of the investment management industry and the role that it plays in today’s markets. This course will be of particular benefit to those starting within the investment management industry and those that deal with the financial services industry.

Key Course Benefits

Work-Ready Skills

Delegates leave with practical tools, templatesand methods they canapply immediately atwork.

Better Institutional Results

The programme supports stronger planning, reporting, compliance, accountability and service delivery.

Sponsor-Friendly

This document is designed to help supervisors, HR units and sponsors approve delegate participation quickly.

Professional Recognition

Delegates receive training documentation and a certificate of completion after successful participation.

Our Training Centres & Delivery Options

Magna Skills offers flexible delivery through face-to-face training centres across Africa and beyond, plus Online / E-Learning for delegates who prefer remote participation.

Southern Africa

Practical training destinations with strong travel access and delegate support.

- Pretoria, South Africa
- Vic Falls, Zimbabwe
- Livingstone, Zambia

East Africa

Popular regional centres for government, NGO and donor-funded project teams.

- Kigali, Rwanda
- Kampala, Uganda
- Nairob
- Zanzibar, Tanzania

West Africa & Islands

Strategic locations for regional networking and executive capacity building.

- Accra, Ghana
- Port Louis, Mauritius

International Executive Venue

Premium destination training for senior teams and international delegates.

- Dubai, United Arab Emirates

Online / E-Learning

Attend from anywhere through live online, blended or self-paced learning options.

- Online, E-Learning
- Remote Teams
- Flexib

Organisation-Based Training

Magna Skills can also arrange dedicated in-house training for ministries, NGOs and companies.

- Onsite
- Custom Dates
- Group Training

Ready to Nominate Delegates?

Use the links below to register, review the live course page or contact Magna Skills for organisation-based training support.

Register / Apply Online | **View Full Course Page**

About Magna Skills

Magna Skills Development Institute provides practical capacity building programmes for government departments, NGOs, public institutions, donor-funded projects and private sector professionals across Africa. Our training approach combines expert facilitation, real workplace case studies, practical tools, post-training support and professional documentation that helps organisations strengthen staff performance and service delivery.

Government Training | NGO Capacity Building | Corporate Workshops | Online Learning | Face-to-Face Training | Certifica

Approval & Authorisation Form

This section may be completed by the organisation, department, HR office, finance office or sponsor approving delegate participation. It can be attached to an internal memo, procurement request or training approval submission.

Organisation / Department	
Delegate Name(s)	
Approved Course	Pension Fund and Investment Management
Preferred Delivery Mode	☐ Online ☐ Face-to-Face ☐ Organisation-Based Training
Preferred Training Venue / Date	
Estimated Number of Delegates	
Budget / Vote Number	
Contact Person	
Email / Mobile	

Authorised Name _____ Signature / Stamp _____ Date _____